



# Project Management

It's Not Just IT Anymore  
TIG Conference

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*Presented by:*

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## In this session...

- We all know that effective project management makes a world of difference in delivering a successful project on-time and on-budget.
- And you've probably seen technology tools used to help manage a project (e.g., Basecamp, Central Desktop, SharePoint), but there is a lot more to managing a project.
- In this session we will talk about the characteristics of an effective project manager, including how to bring out the best in your project team, having fun (yes, it is possible), avoiding conflict and misunderstandings, and implementing effective project management across ALL departments of a legal services program.



## In this session *(Continued...)*

### Disclaimer:

- The suggestions in this presentation reflect one of many different ways of conducting project management
- Each project manager has their own style and set of tools for conducting project management, **so there is *NOT just one way*** to be an effective project manager.



# Agenda

- Project Management “Truisms”
- An Exercise
- The What, Who, Why of Project Management
- Core “Pieces” of Project Management
- Characteristics of an “Effective” Project Manager
- Steps to Managing Any Project
- Bringing Out the Best in Your Team – Having Fun!
- Why Do Projects Fail and Solving Problems
- Reporting and Managing Up



# **Project Management Truisms**



# Project Management “Truisms”\*

- Nothing is impossible for the person who doesn't have to do it.
- There's never enough time to do it right the first time but there's always enough time to go back and do it again.
- I know that you believe that you understand what you think I said, but I am not sure you realize that what you heard is not what I meant.
- If you can keep your head while all about you are losing theirs, you haven't understood the plan.



# Project Management “Truisms”\* *(continued...)*

- On Time – For “Cheap” – Works Right – pick two.
- There is no such thing as scope creep, only scope gallop.
- If you don't know how to do a task, start it, then ten people who know less than you will tell you how to do it.
- The person who says it will take the longest and cost the most is the only one with a clue of how to do the job.



# Exercise





# Exercise: How To Change a Flat Tire

- Need 2 volunteers from the audience – You have three (3) minutes to create a plan

- ☐ Scenario :

- You just blew a tire on the highway (on a sunny day).
- The goal – Change the tire quickly
- As a team, and using the whiteboard to write it out, develop the plan to fix the tire (**use the audience for help**)

- ☐ Do you have a “plan” to fix the tire?
- ☐ Do you all agree on how to execute the “plan”?
- ☐ Do you have what you need to execute the “plan”?
- ☐ Do you know who is doing what, when and how?
- ☐ What is your “contingency” plan if your identified plan falls through?



# What We Learned from the Exercise

- Each person has a “vision” of what they see as the plan
- Communicating the plan can be challenging
- Each person has a different level of knowledge and experience
- Each person has their own pace on implementing a plan
- Having a contingency plan is a must
- Patience is a virtue



# **Project Management**

***(a.k.a., the “Whack-a-Mole Role”)***



# What is Project Management?

- Effectively managing and delivering a project on-time and on-budget.
- Do you have to be certified by the PMI\*?  
That is certainly an option, but it's not required to be a good project manager.

\*See Project Management Institute for certification information at <http://www.pmi.org/Pages/default.aspx>



# What Projects Should Use Project Management?

- Anything with a goal and/or expected outcome, regardless if it has a budget or not, can benefit from using project management principles.
  - Legal Services Examples:
    - Office project to “go green”
    - HR project to transition to a new reporting system
    - Forming a new legal clinic
    - Making modifications to case management
    - Training on new confidentiality practice
    - Safety training for dealing with difficult clients

# Who Does Project Management?

- People at all levels of an organization, **NOT** just IT people.





# Why Use Project Management on ALL Projects?

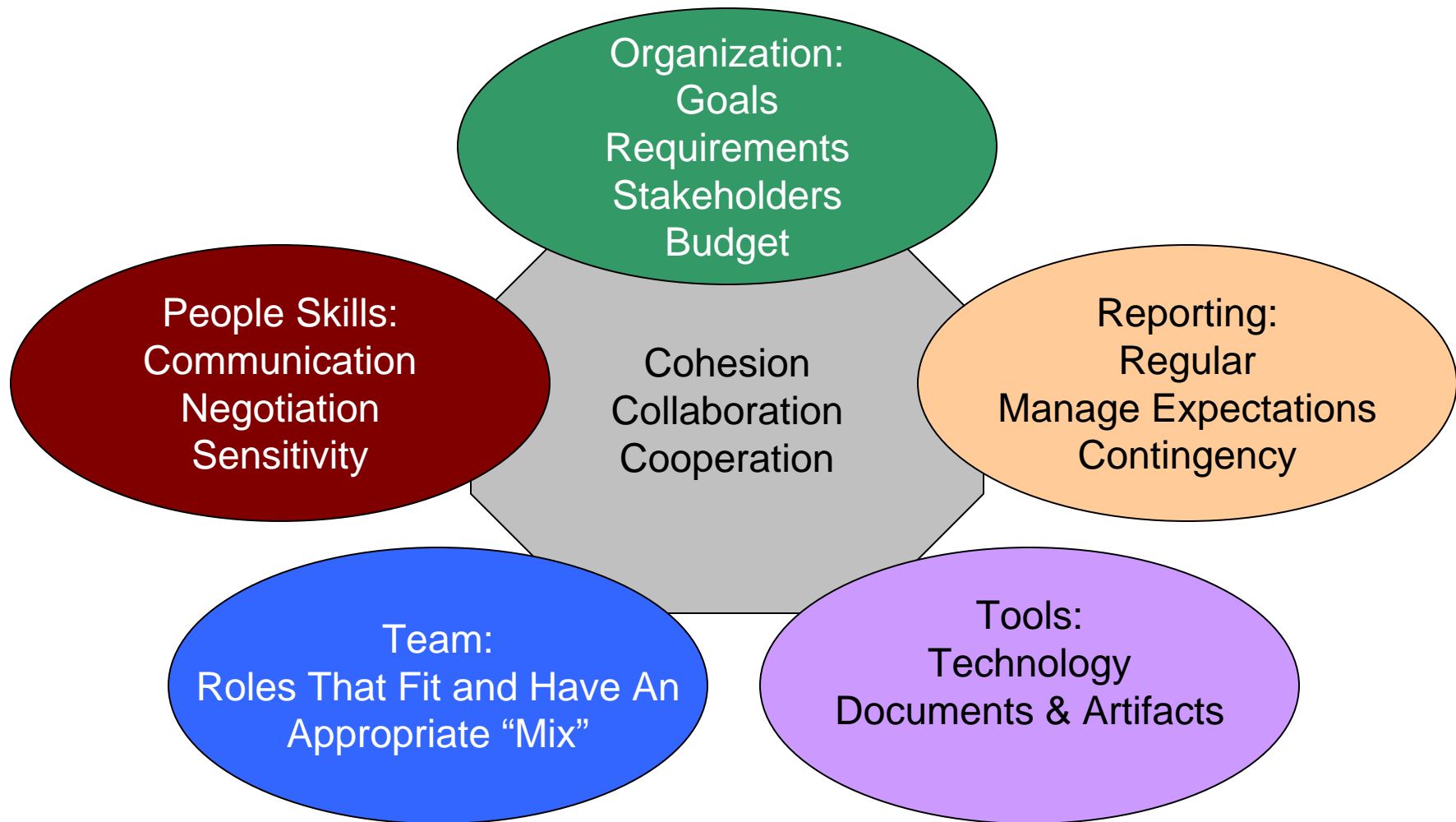
- What you “think” everyone is saying looks very different when they “see it”.
- Resource and cost management depends upon identifying members of the team, and defining exactly:
  - ☐ What each team member is doing
  - ☐ When, how, and for how long
  - ☐ At what cost
  - ☐ With what outcome
  - ☐ With what measurements



# **Core “Pieces” of Project Management**



# Core “Pieces” of Project Management



# Core “Pieces” of Project Management - Goals

- Goals for a project – Specific, agreed upon, manageable and DOABLE!
- Requirements definition – Gathered from stakeholders and end users; always write it down and DRAW IT OUT, then get agreement from everyone **BEFORE** implementing.



Organization:  
Goals  
Requirements  
Stakeholders  
Budget



# Core “Pieces” of Project Management – People Skills

- Listen with empathy – understanding someone else’s thoughts, feelings, emotions and motivations
- Talk in understandable terms – Just because you understand the “jargon” doesn’t mean that everyone does (e.g., spewing tech jargon doesn’t make you look smarter, just unable to communicate)
- Be patient with end users – Regardless if a project is IT-related, or involves an “offline” project, most people don’t think in the same terms, nor do they all share exactly the same level of understanding in a given area.

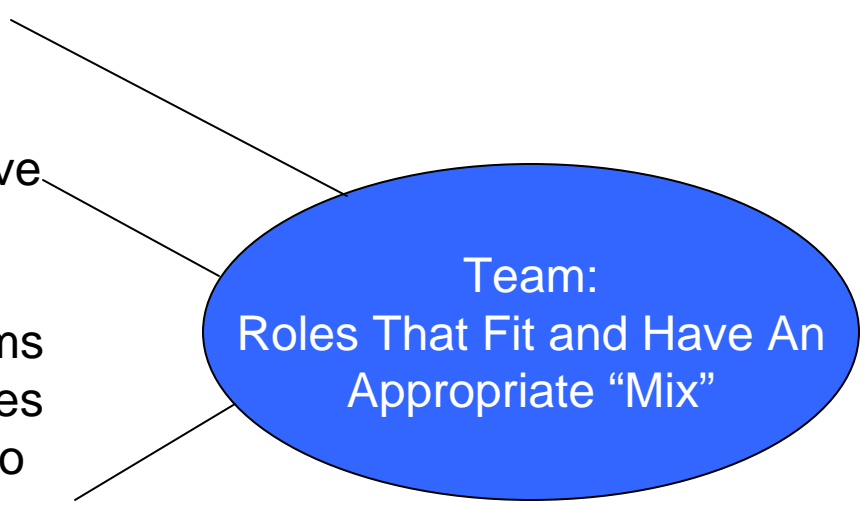


People Skills:  
Communication  
Negotiation  
Sensitivity



# Core “Pieces” of Project Management – Team

- Team – Every member should have a skill that complements the team
- Respect differences – Each perspective provides value
- Handle conflicts with care and criticisms with chocolate – There will be differences of opinion; it's knowing when and how to address them in a non-confrontational manner that can make a big difference in bringing the team together, or pulling it apart.



Team:  
Roles That Fit and Have An  
Appropriate “Mix”



# Core “Pieces” of Project Management – Tools

- GoToMeeting / GoToWebinar
  - For Communications, collaboration, meetings, etc.

- Project Management Technology
  - Basecamp
  - Central Desktop
  - SharePoint
  - Microsoft Project (and other MS products)



Tools:  
Technology  
Documents & Artifacts

# Basecamp, Central Desktop, SharePoint

[Back to Dashboard](#) | [Switch to a different project](#)Project Set

## Court Tour Audio-to-Video Project

Huber and Company

[Overview](#) | [Messages](#) | [To-Do](#) | [Milestones](#) | [Writeboards](#) | [Chat](#) | [Files](#)People &

### Project overview & activity

[New message](#) | [New to-do list](#) | [New milestone](#) | [New file](#)

TODAY

Comment

[Re: Better Way to Download Video Files](#)

Posted by Bryan H.

Comment

[Re: Better Way to Download Video Files](#)

Posted by Cynthia V.

WEDNESDAY, 17 DECEMBER 2008

Comment

[Re: Better Way to Download Video Files](#)

Posted by Chris C.

Comment

[Re: Better Way to Download Video Files](#)

Posted by Bryan H.

Milestone

[Integrate Videos with Player on Website](#)

Completed by Cynthia V.

Milestone

[Chris and Justin - Integrate Videos](#) (Due 5 Jan)

Assigned to Chris C.

Message

[Better Way to Download Video Files](#)

Posted by Cynthia V.

TUESDAY, 16 DECEMBER 2008

Comment

[Re: Kaiyo Assistance with Court Tour Movie Integration](#)

Posted by Cynthia V.



 **This project's RSS feed**

[Subscribe to your project RSS feed](#)  
someone posts a message, comm  
completes a to-do item or mileston  
[RSS?](#)

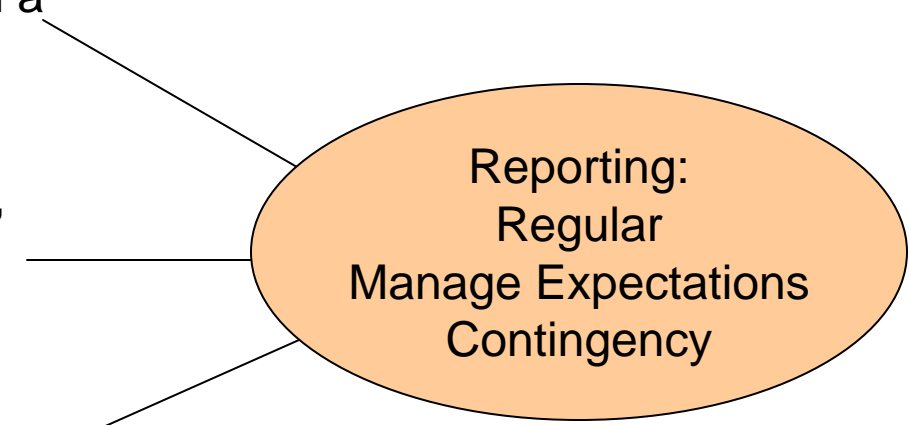
**People on this project**

**Ohio Legal Assistance Foundation**  
Cynthia Vaughn  
You are logged in right now  
Jeffrey Fortkamp  
Latest activity 10 days ago



# Core “Pieces” of Project Management – Reporting and Managing Expectations

- Reporting – Keep up with reporting on a weekly, monthly and quarterly basis
- Regular reporting - Helps to manage expectations and report “critical events” that can, and often do, impact deliverables of a project
- Contingency planning – Based on the “what-ifs” **BEFORE** they happen



Reporting:  
Regular  
Manage Expectations  
Contingency



# **Characteristics of An Effective Project Manager**



# Characteristics of an Effective Project Manager



- Enjoys managing and organizing details
- Enjoys facilitating communications and working with people
- Has the ability to communicate with a variety of “personality types” and thinking preference styles
- Has the ability to use “intuitive creativity” to keep a project moving

# Characteristics of an Effective Project Manager

(continued...)



- Is constantly scanning the environment for signs of conflict
- Anticipates obstacles and changes in requirements
- Keeps the team and upper management abreast of changes in project timelines and deliverables
- ***Checks their ego-at-the-door*** and knows when to say “I don’t know, but I’ll find out and get back to you”



# **Steps to Managing Any Project**



# Steps to Managing Any Project

- **Step 1:** The Idea is Born of Perceived Necessity – *Inception Stage*
  - Brainstorm first without restriction or the dreaded “yeah but”
  - Narrow down the scope and define goals, outcomes and measurements
  - Setup your project using one of your technology tools
- **Step 2:** The Details (what does that look like and what will it take for it to work) – *Elaboration Stage*
  - Written, specific details
  - DRAW IT OUT – Everyone has a different notion of what it will look like
  - Identify and define your contingency plan



# Steps to Managing Any Project *(continued...)*

- **Step 3:** The Build – ***Construction Stage*** (test, test, test)

- ☐ Construction can be mockups of a print piece, a procedure, a brochure or a web-based tool, but NEVER go to final until all pieces have been tested by stakeholders and end-users

- **Step 4:** “Go Live” – ***Transition Stage***

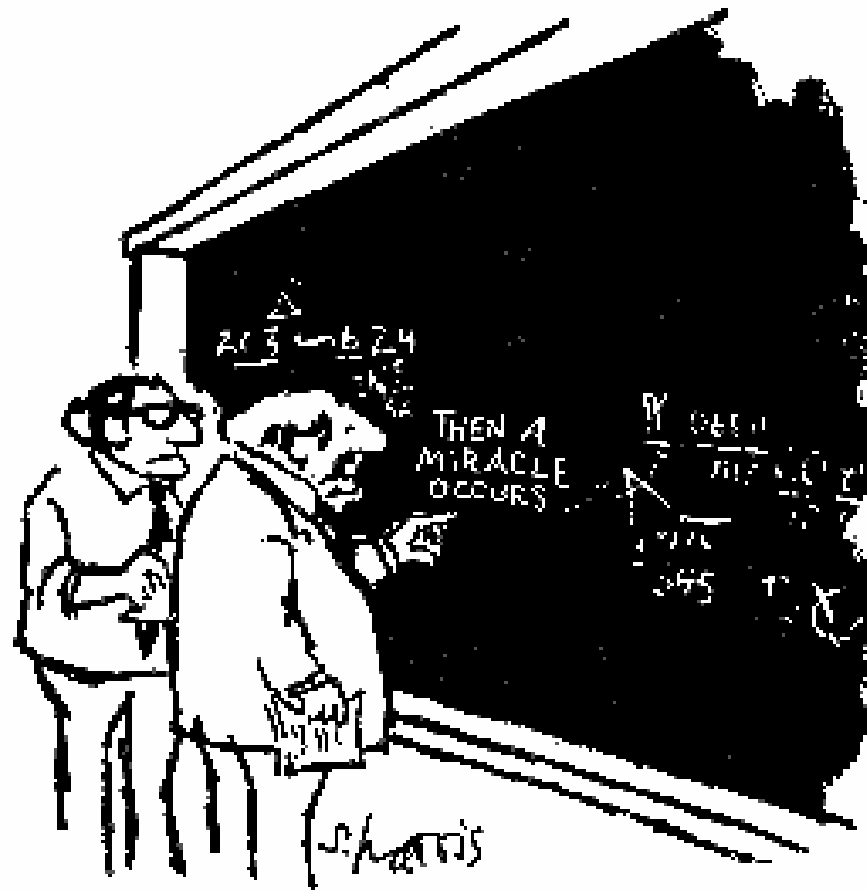
- ☐ Don't forget to brag through email announcements, PR, etc.
- ☐ Measure and report
- ☐ Start again...with refinements, enhancements, changes, etc.



# Specific Requirements and Mitigating “Scope Creep”

- Talk in layman's terms – talking over peoples' heads doesn't show them how smart you are...it just shows how poorly you are communicating
- Never assume everyone see's the same vision and outcome
- Clearly define the end goal, how success will be measured and how enhancements, refinements and/or fixes will be made in the future
- Use the phased approach to every “stage”

# Miracle Happens Here



"I think you should be more explicit here in step two."

You Want It When?

**YOU WANT IT WHEN?**







# **Bringing Out the Best in Your Team**



# Bringing Out the Best in Your Team

- A “happy” team:
  - ☐ Knows what each team member is responsible for on the project
  - ☐ Feels empowered to do what they do best
  - ☐ Doesn't feel micro-managed
  - ☐ Is clear on goals and outcomes
  - ☐ Feels like their project manager “has their back”



# Why Projects Fail...





# Top Five Reasons Organizations Fail at Project Management\*

## **1. Organizations don't know how to implement culture change**

Most organizations don't know how to manage culture change in general and project management in particular.

## **2. Your organization is not committed**

Many organizations say they want good project management, but the words say one thing, and actions say another.



# Top Five Reasons Organizations Fail at Project Management\* *(continued...)*

## **3. You may have been burned in the past**

A common criticism of project management methodology is that it is cumbersome, paper intensive, and takes too much focus away from the work at hand.

## **4. Organizations don't value the upfront investment of time**

To be good at project management, you have to understand that the upfront planning process has value.



# Top Five Reasons Organizations Fail at Project Management\* *(continued...)*

## **5. Senior managers think that project management is a software tool**

When you discuss project management with some managers, they initially think you are trying to implement a tool that allows you to be a better project manager.

Even though some aspects of project management use technology, that is not where the value of project management is. Instead, project management is about skills and discipline.



# Percentage of Projects That Fail

- According to new research\*, success in 68% of technology projects is “improbable.”
- The reasons include:
  - Poor requirements analysis causes many of these failures, meaning projects are doomed right from the start.

\* TechRepublic.com



# **Solving Problems**





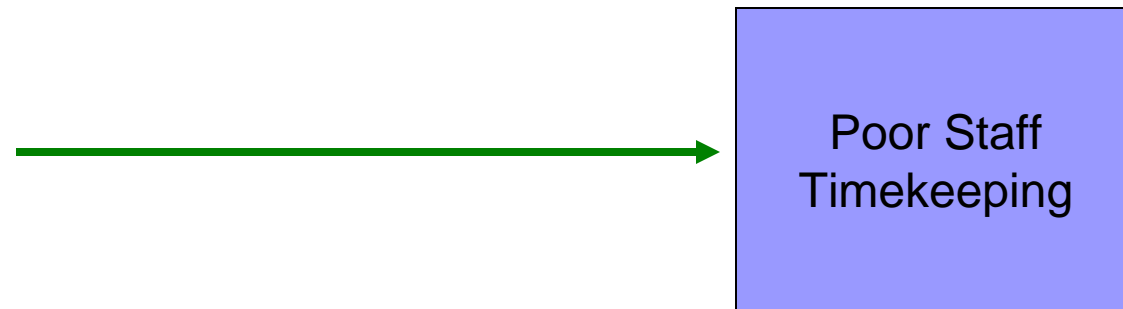
# A Technique for Analyzing Critical Project Problems\*

- Cause and Effect Diagram – Fishbone Diagram
  - Problems can happen on any project.
  - Identifying interrelated causes can help analyze the situation and provide possible solutions
  - Benefits of the technique include:
    - Various causes can be explored
    - Encourages brainstorming for solutions
    - Provides a “visual” representation of the problem and possible causes

*\*Reference - See Tom Mochal <http://blogs.techrepublic.com> July, 2008*

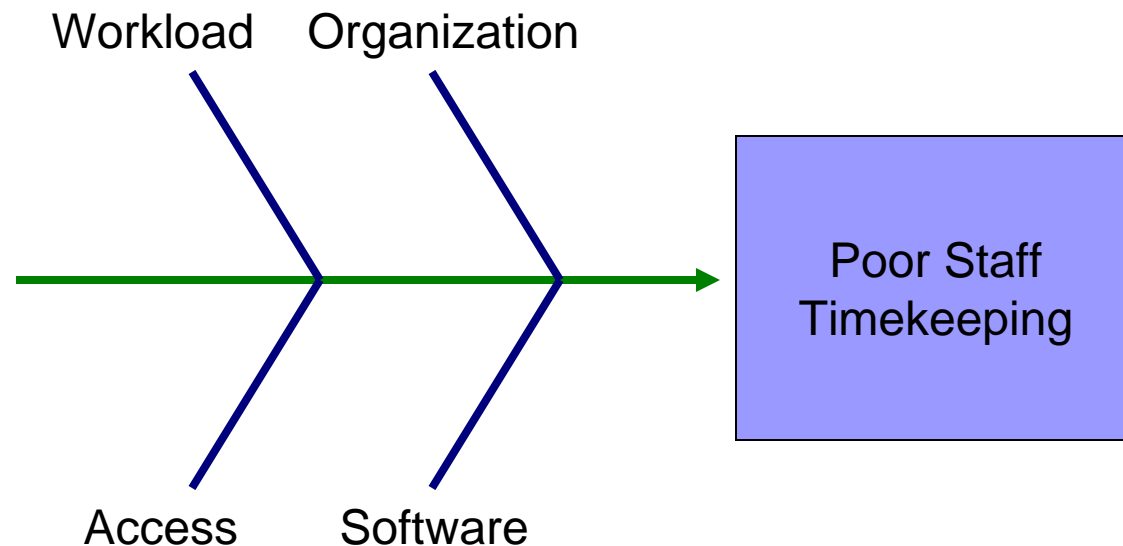
# Fishbone Diagram

- Step 1– Describe the problem in a box on the right-hand side of the diagram and create the “fish” backbone by drawing a line to the problem.



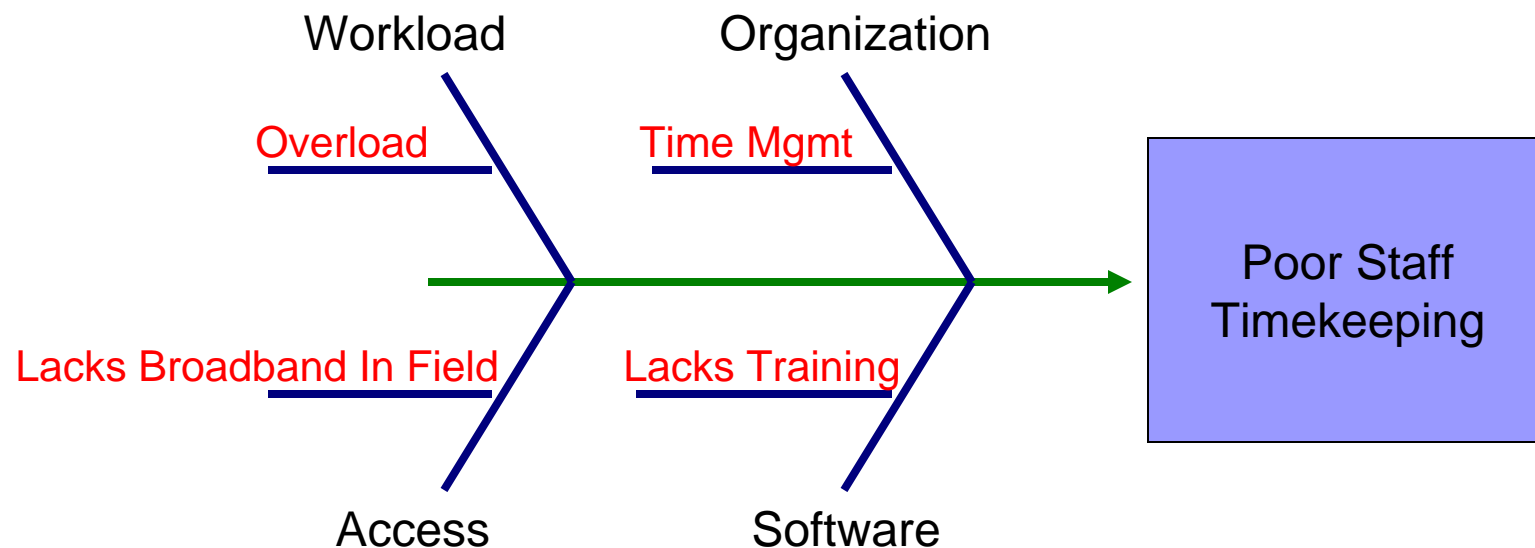
# Fishbone Diagram *(continued...)*

- Step 2– Identify potential causes for the problem and group them as the “bones” of the fish. Use brainstorming to identify causes.



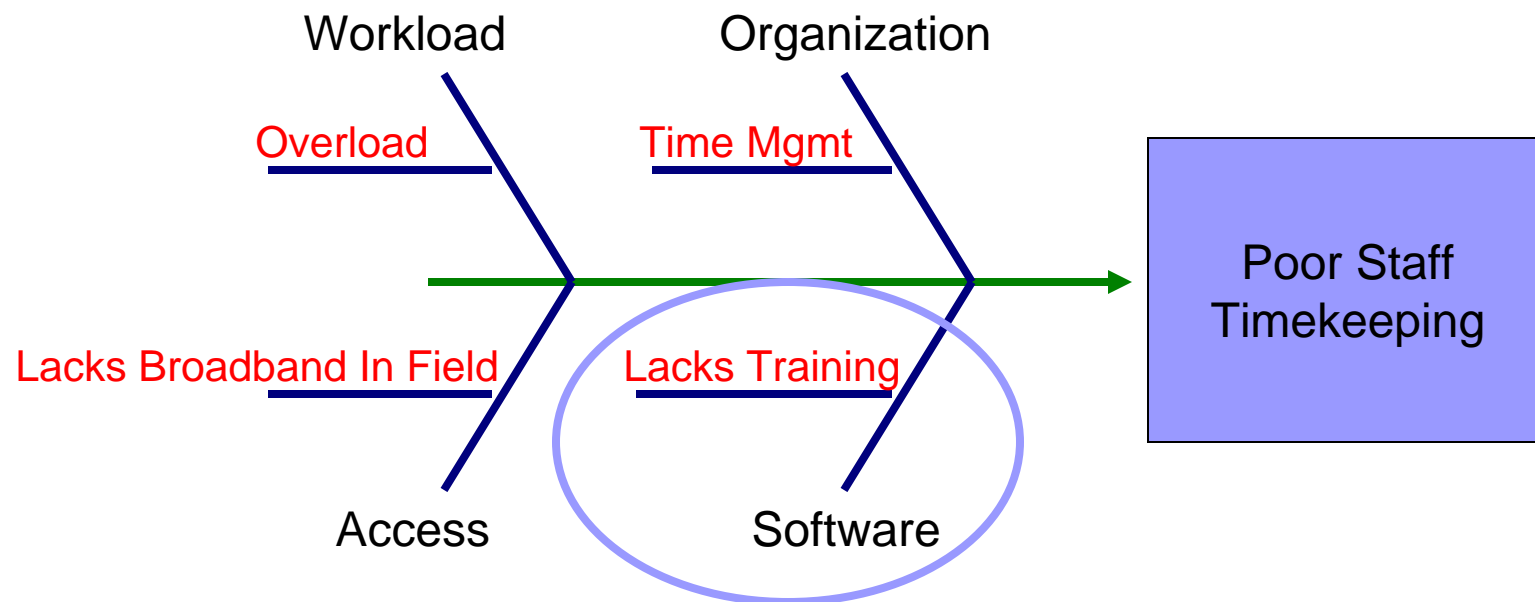
# Fishbone Diagram *(continued...)*

- Step 3— Continue to brainstorm causes and fill in each “bone” with more details. Three levels of detail are usually enough.



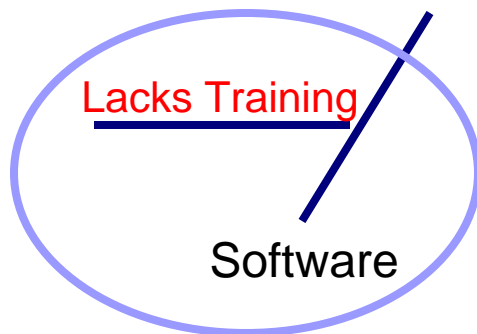
# Fishbone Diagram *(continued...)*

- Step 4 – Analyze potential causes, then circle the one(s) that is most likely contributing to the problem.



# Fishbone Diagram *(continued...)*

- Step 5 - Create a detailed task list with priorities and specific assignments to team members, with deadlines stating when issues will be resolved.



1. Survey all staff to determine degree of problem
2. Identify staff that can train on software
3. Setup schedule of online training sessions
4. Conduct training sessions
5. Survey all staff for feedback on training
6. Re-evaluate and measure staff time keeping



# **Reporting and Managing Up**



# Reporting and Managing Up

- Keep management in the loop with reports but they don't need to see every detail
  - Utilize your project management software to create executive summary style reports
  - Providing a lot of detail can be confusing and frustrating for management, especially if they are not as well versed in the details of the project
- Copy management on emails that involve decisions and/or situations that are beyond the authority of the project manager
  - Don't use email to try to force a decision – use “H-2-H” (a.k.a. face-to-face contact) for discussions
- If a decision needs to be made, the project manager facilitates that conversation





# Questions?

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